In-Store Personal Setup Program Guide

August 2017 • Version 2.0 • All Employees • Global

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An Introduction to Personal Setup

Personal Setup is our opportunity to set every Apple customer up for success. Each person who buys from Apple has distinct needs, desires, and passions. Through Personal Setup, we introduce customers to product features, apps, and services, and invite them to go further with Today at Apple sessions, an Online Personal Session, Apple Support, and more.

Who Personal Setup Serves

Customers who buy a new iPhone, iPad, Mac, or Apple Watch direct from Apple should be offered Personal Setup.

Why Is Personal Setup Important?

Personal Setup gives you, our team, an opportunity to connect with our customers, building deeper trust while enriching your knowledge of our products and services at the same time.

Because Personal Setup empowers our customers to get even more from their Apple products, it boosts loyalty. When customers experience Personal Setup, we see a 20-plus point increase in NPS scores. When we emphasize personalization and the Apple ecosystem during Personal Setup, this uplifting effect is even more significant.

Your Role

- Specialists, Experts, and Pros lead Personal Setup for new devices.
- Creatives provide support, when it's needed, to the Product Zone with their deep knowledge in passion points and expertise.
- Technical Specialists, Technical Experts, and Geniuses lead Personal Setup for repaired and replaced devices.
- Leaders have the opportunity to make Personal Setup a great experience not only to our customers, but also to every team member. This starts with scheduling enough team members to support customers and continues with engaging the team through timely support, coaching, and recognition.

A great team culture is key to the success of Personal Setup. Everyone should invite customers to go further with the Apple ecosystem.

Personal Setup Overview | In Store

Depending on store traffic, Personal Setup can be conducted in a one-on-one, one-to-few, or group setting. This allows team members to tailor the setup process to customers' interests and passions, while accommodating for store velocity. This assures customers get a timely, tailored setup experience, even when our stores are busy. It also offers customers an opportunity to experience the vibrant community setting of Apple Retail

	Step	Type of Interaction	Actions
1	**Probe**	1:1	Ask and listen as customer explores
2	**Invite to Setup**	1:1	Offer setup help to every customer
3	**Warm Introduction**	1:1	Warmly Introduce Customers to Setup Area
4	**Get Up and Running**	1: few & Group	Unboxing: Hardware and features Apple ID
5	**Invite to Go Further During Personal Setup**	1: few & Group	Show features, apps, services (Apple Pay, Apple Music) Show and interact with: • Today at Apple • Online Personal Session • Apple Support

If customers skip Personal Setup in store:

	Step	Type of Interaction	Actions
1	**Probe**	1:1	Ask and listen as customer explores
2	**Invite to Setup**	1:1	Offer setup help to every customer
6	**Invite to Go Further Without Personal Setup In Store**	1:1	Quickly recommend: • Apple Pay, Apple Music • Online Personal Session • Today at Apple • Apple Support

Detailed Guide to Personal Setup | In-Store

Here's a detailed explanation of each step.

1. Probe

While customers are exploring our stores and all we have to offer, team members should probe and listen to them. Use this time to learn a few things about the customers:

- Are they an individual, family member, entrepreneur, or educator?
- What are their product needs? What do they use products for?
- What are they passionate about?
- Are they new to Apple or familiar with our products?

2. Invite to Personal Setup

After customers make a purchase, invite them to participate in Personal Setup. Be sure to make this invitation relevant to them by mentioning a personalized benefit they'll experience. If the store is experiencing high velocity, make sure they know that if they set up in store, they'll be doing so in a group setting.

3. Warm Introduction to the Setup Area

If customers choose Personal Setup in store, make the transition to Personal Setup seamless by taking time to share relevant details about your customer. That way, the Specialist leading Personal Setup can tailor their session accordingly. And together you'll create a more personalized and memorable experience.

1. Select "Yes" in EasyPay to complete the transaction.
2. Create a **warm introduction** to the Personal Setup table. A warm introduction should include:
    - the customer's name
    - whether it's their first device of its kind
    - details about the individual and how they plan to use their product

4. Get Up and Running

1. **Unbox —** At the Personal Setup table, help customers unbox their new devices, and explain what's in the box as they open it.
2. **Tour hardware and features, and set up Apple ID —** We give those who are new to Apple a tour of the hardware and key features, while also getting their Apple ID set up on their new device. If members of the group are new to Apple, be sure to offer them additional guidance. For the entire group, highlight key features common across the group's purchases, such as gestures on the multi-touch screen and the camera. Explain how to use any accessories.

> **Remember: Let the customer drive.**
> Providing a hands-on experience allows customers to maintain a sense of control and feel more comfortable about security and privacy.

See "Device Specific Setup" for guidance on setting up Apple Watch and Mac.
See "Data Transfer" for guidance on positioning and conduct data transfer.

5. Invite to Go Further During Personal Setup

After customers get their devices up and running, you can help to personalize their devices and take their skills to the next level by inviting them to go further. In a group setting there is less time to make personal connections with every individual, but you still have the opportunity to emphasize how going further will help each individual to get the most out of their devices.

1. **Identify passions** — Start by identifying common questions or interests within the group. You can do this by sharing personal experiences and/or asking about shared interests. Once you understand the group's common needs and passions, you can tailor the experience to those topics.
2. **Recommend relevant apps and services —** Suggest a few apps and services (Apple Pay, Apple Music) to the group. Be sure they know where to find them on their devices.
3. **Invite to go further —** Introduce services from Apple that will help them go further in doing what they enjoy:
    - Today at Apple — Today at Apple sessions are a great way for customers to pursue their passions with Apple. Suggest several upcoming events or sessions relevant to their interests. Show them how to sign up at apple.com/today or the Apple Store app. Help them download the Apple Store app.
    - Online Personal Session — Online Personal Session allows customers to go further through a one-on-one video session with an Online Specialist. Invite them to check out a session on their own time. Be sure they know that an invitation will arrive at the email address provided on their e-receipt. See "Online Personal Session Guide" for more information.
    - Apple Support — When customers need help solving an issue or with technical support, or are trying to do more, Apple Support is there. Customers may get support via chat, phone, and in person. Make sure customers know they can easily access Apple Support using the Apple Support app or at support.apple.com. Help them download the Apple Support app.

Work with your team to answer questions and help customers go deeper within their interests. Also, offer to assist them with any additional purchases after the session.

6. Invite to Go Further Without Personal Setup In Store

Some customers will prefer to skip Personal Setup in store. When that's the case, it's our job to make sure they're equipped with relevant ways to go further once they leave the store. This invitation should feel brief and personal and empower the customer to do more.

1. Select "No" in EasyPay to complete the transaction.
2. While waiting for products to arrive, give the customer a quick and personalized tour of how to go further with the Apple ecosystem that is relevant to their lives.
    - Apple Services — Apple Pay, Apple Music.
    - Online Personal Session — Online Personal Session allows customers to set up their new device and/or go further through a one-on-one video session with an Online Specialist. Invite them to check out a session on their own time. Be sure they know that an invitation will arrive at the email address provided on their e-receipt. See "Online Personal Session Guide" for more information.
    - Today at Apple — Today at Apple sessions are a great way for customers to pursue their passions with Apple. Suggest an upcoming session relevant to them. Show them how to sign up at apple.com/today or on the Apple Store app.
    - Apple Support — When customers need help solving an issue or with technical support, or are trying to do more, Apple Support is there. Customers may get support via chat, phone, and in person. Make sure customers know they can easily access Apple Support using the Apple Support app or at support.apple.com.

Inviting Customers to Go Further with Their Passion | Four Examples

Consider the following examples for ideas and inspiration when uncovering a customer's passion and helping them go further in relevant ways.

Passion: Photography

- **Identify a passion** — A customer is exploring the Product Zone. A Specialist notices they're looking at the Photos app. They approach and ask the customer how they take photographs today. The customer says they use their old iPhone and that they have many photographs that they would like to edit and share with family and friends.
- **Invite to go further** — After the customer is up and running on a new device, the Specialist shows them how to share photos. They also suggest a Today at Apple session called "Photo Walk," which teaches photography skills, and a session called "Studio Hours," which will help them edit their photo album or gallery. Following these suggestions, they show the customer how to sign up for those sessions through the Apple Store app or apple.com/today.

Passion: Music

- **Identify a passion** — A Specialist approaches a family exploring the iPad models in Product Zone. Through conversation, the Specialist learns that the family wants to buy two iPad devices for their upcoming family vacation, and both kids enjoy listening to music and watching movies.
- **Invite to go further** — The Specialist shows them the wireless headphones in the Avenues and talks about how these can be paired with iPad devices so the kids can listen to music or watch movies during long car rides. While helping the family set up their new iPad units, the Specialist tells them more about a Today at Apple session featuring GarageBand and shows the parents how to sign up for the session through the Apple Store app or apple.com/today. The Specialist shows them how they can even share the music they've made with each other via AirDrop and iCloud Family Sharing and reminds them to turn to Apple Support if they ever have a question about music streaming.

Passion: Coding

- **Identify a passion** — A Specialist sees two kids playing with a Mac. The Specialist asks them about what they're doing, and they begin talking about how much they enjoy Minecraft. The Specialist asks about what they've built in their favorite game.
- **Invite to go further** — The Specialist shows the entire family where they can download Swift Playgrounds and suggests they check it out. The Specialist also suggests they check out the Today at Apple sessions called "Kids' Hour" and "Field Trip", and shows them how to sign up for the sessions through the Apple Store app or at apple.com/today.

Art and Design

- **Identify a passion** — A customer comes in to pick up an iPad Pro with a repaired cracked screen. While waiting for their device to arrive from Backstage, the Technical Specialist asks how they like the iPad Pro. The customer says they are a graphic designer and really enjoys using the Pencil for sketches at work.
- **Invite to go further** — The Technical Specialist explains that if they want to learn more tricks with the Apple Pencil and iPad Pro, they should consider setting up an Online Personal Session and a Today at Apple session called "Sketch Walk." The Technical Specialist shows the customer how to sign up for the session through the Apple Store app or apple.com/today. The Technical Specialist introduces the Apple Support app as the best way to get help, including booking a Genius Bar session.

Device-Specific Setup

The Apple Watch and Mac models require distinct setup experiences from iPhone. Use the following guidelines to assure Personal Setup is relevant to these devices.

Setting up Apple Watch

- Start the sync from the Apple Watch app on iPhone.
- Choose available apps to install.
- Apple Watch indicates the name of each app and its progress on the Apple Watch screen.
- If your customer would like to leave the store while Apple Watch syncs, they can return when the sync is finished. The Apple Watch and iPhone must stay with the customer for the sync to complete.
- Complete the sync.
- When the sync is complete, an "Apple Watch Is Ready" dialogue appears. Tap OK to continue, and the device is ready.

Setting up Mac

- Tour the hardware features, and explain the ports and cables.
- Start the Setup Assistant and let the customer drive through the setup screens.
- Help the customer set up and pair any Apple Bluetooth accessories.

Resource Planning

As a Leader, there are a few things you can do to set teams up for success.

- Specialists should be zoned at the Setup table to lead Personal Setup in two- to four-hour increments. This helps them stay fresh while ensuring continuity for our customers. Use the labor forecast in Kronos to schedule the right number of Specialists needed.
- Consider scheduling more experienced Specialists to conduct Personal Setup in a group setting. Pair strong Specialists with Specialists who are newer or could benefit from shadowing.
- Schedule Creatives to support Personal Setup sessions when they are needed. They can help to personalize the setup experience to individuals in a group setting.

Personal Setup is a great time to uncover potential Business customers. If a Business team member is unavailable, use Concierge to create a Business Introduction.

Appendix

Troubleshooting Apple ID in Detail

Multiple Apple IDs cause customer confusion.First, ask if the customer has an existing Apple ID, and use the iCloud Support App to confirm their Apple ID.

Don't create a new Apple ID without first asking:

- Have you purchased or downloaded content from iTunes, the App Store, or iBooks?
- Have you signed in to FaceTime, iChat, or Game Center?
- Have you purchased from apple.com before?
- Are you a MobileMe member? (including .me and .mac)
- Do you share an Apple ID with someone? (Encourage them to use their own.)

Additional Resources
Definitive article on Apple ID: http://support.apple.com/kb/HT4895

iCloud Support App

Every Isaac device has an app called the iCloud Support App, created to help you confirm a customer's Apple ID and iCloud backup status. You can also initiate a password reset if a customer forgot their credentials.

Troubleshooting Email for iOS

Tap Settings from the home screen. Tap Mail, Contacts, Calendars. Tap Add Account. Select the email provider or tap Other, then Add Mail Account. If the customer uses a common email provider, the device will load their email settings. If the device doesn't load these settings, contact your email provider and ask for this information:

Incoming Mail Server Settings

- Account type (POP or IMAP)
- Incoming mail server:
  - Username and password
  - Incoming server port number
  - Incoming server supports SSL? (yes or no)

Outgoing Mail Server Settings

- Outgoing mail server:
  - Username and password
  - Outgoing server port
  - Outgoing server supports SSL? (yes or no)

Software Updates

Software updates should be made at Personal Setup when a new version is released or when the installation is required to complete Personal Setup. If the customer has already opened their device and loaded their own content, do not install the updates. Instead, educate the customer on how they can perform the software update themselves at home.

Always install all available software updates before backing up or trying to restore a backup from iCloud or iTunes. Use this as an opportunity to educate your customers on the importance of software updates, and showcase the over-the-air update features.

Data Transfer

Personal Setup is not intended for data migration. You can help transfer personal data such as contacts and message history, but you won't be able to have all data transferred during the Personal Setup. Show the customer how to transfer data at home. If a customer needs full data migration help, direct them to Contact Apple Support.

Mac-to-PC data transfer may be done through the Genius Grove/Bar for a fee, or the customer may work through Migration Assistant to transfer data at home.

How to Position Data Transfer

Use the following language to guide how to introduce data transfer to customers:

> "As a part of Personal Setup, we can help you transfer personal data from your old phone to your new iPhone. It can take more time, depending on how much content you have. If it's OK with you, let's see how much storage you're currently using and talk about the content that's most important to you to see how long a transfer will take."

Migrating Data from Home

If customers opt to transfer their iPhone data at home, refer them to apple.com/iphone/switch-to-iphone. For a Mac: https://support.apple.com/en-us/HT204350.

Switching from a Non-Apple Phone

Switching from a non-Apple phone is fast and easy with our "Move to iOS" app or Cellebrite Touch, which helps customers transfer their contacts, message history, mail accounts, calendars, free apps, web bookmarks, camera photos, and videos.

Before you begin:

- Find out what content is most important to your customer.
- Check storage capabilities on the customer's new device.
- Estimate the time needed to complete the transfer.

Additional Resources:

- Data Migration Guide
- Cellebrite instructions

- Cellebrite Quick Touch Guide

Personal Setup Merchandising

Keeping a clear and organized space is critical to delivering a quality experience at Personal Setup.

Demo MacBook Pros
Machines should be accessible to all customers, unlocked, and functional. Screens should be open and set to 70 degrees.

Demo iPad Devices
Since most customers who want to go further will either be restoring from an iCloud backup or setting up their device as new, use the demo iPad devices to help guide the group conversation. It's a great way to show off the App Store or demo tips and tricks when the customers' devices are busy getting up and running. Demo iPad units should be charged in BOH.

Stools
Stools should be evenly spaced with a minimum of two per solution. Legs should be parallel to the table or wall, with 25 percent of the seat sticking out. Stools should never be removed.

Clutter
Personal Setup should be a clutter-free environment at all times. Keep the space clear. The demo machines are the only items that should be displayed on the tables. Use the storage drawers to store tools that may need to be accessed during Personal Setup.

Cellebrite Storage
Bring Cellebrite machines out only as needed. When not in use, store Cellebrite and cables inside drawers or behind the Genius Grove/Genius Bar.

Cabling
Manage your cables inside the table, tucking them into the table when not in use. Do not cable manage outside the table. Plug in the Cellebrite power adaptor inside the table for each access.

For Cellebrite cable or device replacement, contact retailsupply@apple.com.

Related Materials:

- Personal Setup — Core Training Trainer Guide
- Personal Setup — Core Training Participant Guide
- Online Personal Session Guide

For general questions, contact Global Store Support at storesupport@apple.com.

Frequently Asked Questions

What if customers have different levels of expectation during Personal Setup?

Provide what's most commonly needed in your group, recommending customers go further with a Today at Apple session and an Online Personal Session.

What if customers struggle to finish the Personal Setup session?

Let customers know that what we do best at Personal Setup is show them what's suitable for them. Apple has great services available, with people in place to help our customers do more. Introduce a Today at Apple session and an Online Personal Session for learning-related questions. Introduce Apple Support for technical troubleshooting questions.

What if data transfer takes too long?

Set the right expectation for what you can help with at the moment, and then show the customers how to continue by themselves. Introduce Contact Apple Support as the best option to get technical support. Encourage them to check out a Today at Apple session while they're waiting, if they would like to stay in store.

Do we need to recommend all services to our customers?

Do not run through a static checklist with every customer. Customers will only accept and remember the recommendation that is relevant to their specific needs and interest. Probe early to find out who they are, what they are interested in, and how they prefer to engage with technology, and then recommend the relevant services accordingly.

How do we support customers with questions that require a longer time to answer, such as third-party apps, iCloud passwords, and data migration?

Team members should spend one to five minutes answering how-to questions from our customers. Introduce a Today at Apple session and an Online Personal Session if they want to know more about what they can do with their devices related to their passions. Introduce Apple Support for technical troubleshooting questions.